

RECORDS RETENTION SCHEDULE APPROVAL REQUEST

Submit three copies with three copies of the Records Retention Schedule, STD. 73.

(1) DEPARTMENT, BOARD OR COMMISSION
EDD
DIVISION, BUREAU OR OTHER UNIT
Director's Office
ADDRESS
Act Sec'd 1 Mar 11

Bob Capital Mall, Room 5000, Sacramento 95814

1500 5th Street, Room 116
Sacramento, CA 95814 (or IMS C-39)

(916) 445-2294 or CALNET 485-2294.

(4) ☐ Amending some pages of a previous schedule. (Complete boxes 8 - 12.)
(The original approval number will remain in effect.)

(6) SCHEDULE DATE	(7) NUMBER OF PAGES

May 7, 2002

(7) NUMBER OF PAGES	4
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**PREVIOUS SCHEDULE
INFORMATION**
(If applicable)

(9) SCHEDULE NUMBER(S)

(10) APPROVAL NUMBER(S)

(11) APPROVAL DATE(S)

(12) PAGE NUMBER(S) REVISED

PART I -- AGENCY STATEMENTS

(13) SIGNATURE--MANAGER DIRECTLY RESPONSIBLE FOR THE RECORDS

Q4) TITLE

(M4) TITLE :

(15) DATE SIGNED

I hereby certify that I am authorized to act on behalf of the head of this agency in matters pertaining to the retention and disposal of records. (Per Section 1611 of the State Administrative Manual.)

(16) SIGNATURE--RECORDS MANAGEMENT ANALYST

(18) NAME (Printed or Typed) Jammy June

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Records Analyst

(20) DATE SIGNED

231	SIGNATURE	DATE	FOR CONSULTANT	FOR GOVERNMENT	FOR OTHER
	PART II -- DEPARTMENT OF GENERAL SERVICES APPROVAL (Per Government Code Section 14755)				

(21) SIGNATURE—OIS CONSULTANT

2000

(22) APPROVAL NUMBER

02-199

(23) TITLE

Off. E. Fritz/Renda Management Consultant

(24) DATE SIGNED _____

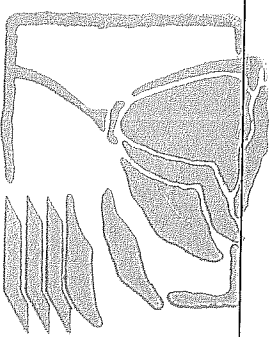
Signed _____
5/14/02

PART III -- ARCHIVAL SELECTION (Per Government Code Section 14755)

THE ATTACHED RECORDS RETENTION SCHEDULE:

(25) ☐ Contains no material subject to further review by the California State Archives

~~(25)~~ Contains material subject to archival review. Items stamped "Hold/Notify Archives" may not be destroyed without clearance by the Secretary of State. (*Per Section 1614 of the State Administrative Manual.*)



(27) ~~SIGNATURE~~ CHIEF OF ARCHIVES

△

(28) DATE SIGNED

5/22/02

STATIONARY

65124

RECORDS RETENTION SCHEDULE

STD. 73 (REV. 2-96) (FMC)

See instructions on reverse
and in SAM 1600

DEPARTMENT (1)

Employment Development Department

ORGANIZATIONAL UNIT

Director's Office

ADDRESS (Number

800

Street

Capitol Mall

City)

Sacramento

SCHEDULE NUMBER (2)

101

DATE (3)

May 7, 2002

PAGE

OF

PAGES (4)

1

4

DEPARTMENT OF GENERAL SERVICES APPROVAL NUMBER (5)

02-196

ITEM NUMBER (6)	CUBIC FEET* (7)	CALIFORNIA STATE ARCHIVES USE ONLY (8)	TITLE AND DESCRIPTION OF RECORDS (Triple space between items) (9)	MEDIA (10)	VITAL (11)	RETENTION				PRA (Exempt) & IPA (16)	REMARKS (17)
						OFFICE (12)	DEPT. (13)	SRC (14)	TOTAL (15)		
			<p>MISSION STATEMENT</p> <p>The Director's Office provides operational oversight to all entities that make up the Employment Development Department. The Director's Office also provides functional overview of a variety of services to employers and job seekers, including Unemployment Insurance, Disability Insurance, Job Service, and Employment Tax collection programs.</p> <p>The Director's Office maintains controls over all Branch Deputy Directors, authorizes the travel of the Branch Deputies, and is committed to meet all challenges and take advantage of all opportunities to achieve high quality services and customer satisfaction.</p>								<p>Unless otherwise noted, all retention periods established by Employment Development Department Executive Staff.</p> <p>Unless otherwise noted, all purged records are destroyed by shredding.</p>

Provide total of office and departmental storage only.

STATE OF CALIFORNIA
RECORDS RETENTION SCHEDULE

STD. 73 (REV. 2-96) (FMC)

See instructions on reverse
 and in SAM 1600

DEPARTMENT (1) Employment Development Department		SCHEDULE NUMBER (2) 101	DATE (3) May 7, 2002
ORGANIZATIONAL UNIT Director's Office		PAGE 2	OF 4
ADDRESS (Number Street City) 800 Capitol Mall Sacramento		DEPARTMENT OF GENERAL SERVICES APPROVAL NUMBER (5) 02-196	

ITEM NUMBER (Triple space between items) (6)	CUBIC FEET* (7)	CALIFORNIA STATE ARCHIVES USE ONLY (8)	TITLE AND DESCRIPTION OF RECORDS (Triple space between items) (9)	MEDIA (10)	VITAL (11)	RETENTION				PRA (Exempt) & IPA (16)	REMARKS (17)
						OFFICE (12)	DEPT. (13)	SRC (14)	TOTAL (15)		
1	0	NOTIFY ARCHIVES	HOUSEKEEPING Equipment: - DE 1904E, Equipment Requisition/Transfer - Inventory Records	P		2			2		
2	0		Reproduction Orders (DE 1903):	P		1			1		Retain 1 year after completion of order.
3	1		Contracts & Invoices that could include: - Interagency Agreements - Maintenance Agreements - Warranties - Service - Meter Reading - Rental Car - Miscellaneous	P		A+1			A+1		Informational copies only - Original contracts filed in Contracts Files located in Contracts Group. Purge and destroy 1 year after fiscal year in which contract expired
4	1		Director's Calendar, which could include: - Director's calendar - Director's Speaking Events - Director's Presentation Update - Director's Speech Topics	P		A+4			A+4		Purge 4 years after date of completion.
5	0	NOTIFY ARCHIVES	Director's Office Correspondence, which could include: - Referrals from Governor's Office - Referrals from Agency Secretary	P		A+4			A+4		Correspondence prepared for Director's signature is retained in originating Branch, Section, or Office.
6	0		Facsimile - Transmittals	P		1 mo.			1 mo.		

Provide total of office and departmental storage only.

RECORDS RETENTION SCHEDULE

STD. 73 (REV. 2-96) (FMC)

See instructions on reverse
and in SAM 1600

DEPARTMENT (1)

Employment Development Department

ORGANIZATIONAL UNIT

Director's Office

ADDRESS (Number)

800

Street

Capitol Mall

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SCHEDULE NUMBER (2)

101

DATE (3)

May 7, 2002

PAGE

OF

PAGES (4)

3

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DEPARTMENT OF GENERAL SERVICES APPROVAL NUMBER (5)

02-196

ITEM NUMBE R <i>(Triple space between items)</i> (6)	CUBIC FEET* (7)	CALIFORNIA STATE ARCHIVES USE ONLY (8)	TITLE AND DESCRIPTION OF RECORDS <i>(Triple space between items)</i> (9)	MEDIA (10)	VITAL (11)	RETENTION				PRA (Exempt)	REMARKS (17)
						OFFICE (12)	DEPT. (13)	SRC (14)	TOTAL (15)	& IPA (16)	
7	0		HOUSEKEEPING: STD 70, Records Inventory Worksheet	P		Cur			Cur		Retain as current until next inventory.
8	0		STD 72 & 73, Record Retention Schedule & Approval	P		Cur			Cur		Retain as current until revised.
9	0		STD 71, Records Transfer List	P		Cur			Cur		Retain as current until all records have been destroyed, retired permanently, transferred to Archives, or no longer needed.
10	0		Authorization for Records Destruction	P		4			4		Retain 4 years from destruction date.
11	2		Personnel Files and Related Documents	P		Act+1		3	Act+4	XI	Active until employee no longer employed with this office.
12	3		Attendance Records	P		Act+2		3	Act+5		
13	0		Supply Records	P		FY+1			FY+1		
14	0		Budget	P		FY+2			FY+2		
15	0		Training	P		FY+3			FY+3		
16	0		Travel Expense Claims	P		FY+3			FY+3		
17	0		Illness and Injury Report	P		FY+5			FY+5		
18	1		Telephone Bills	P		FY+2			FY+2		
19			Electronic Mail	**		**			**		**Retain in the office until record has served its purpose
20	0		E-mail - E-mail records that have official records status are subject to EDD's records retention schedules and must be retained in accordance with the schedule. If there is no matching schedule entry, the new e-mail "record" will be added to the schedule as a separate series of records.	M		**			**		**These records generally pertain to previously scheduled record series and must be moved to the matching electronic storage area. The records retention instructions that applied to the previously scheduled series would still apply.
21	20		Non-record E-mail	M		**			**		**Non-record e-mail should be deleted when they have served their purpose.

Provide total of office and departmental storage only.

STATE OF CALIFORNIA
RECORDS RETENTION SCHEDULE

STD. 73 (REV. 2-96) (FMC)

See instructions on reverse
 and in SAM 1600

DEPARTMENT (1) Employment Development Department		SCHEDULE NUMBER (2) 101	DATE (3) May 7, 2002
ORGANIZATIONAL UNIT Director's Office		PAGE 4	OF PAGES (4) 4
ADDRESS (Number) 800		DEPARTMENT OF GENERAL SERVICES APPROVAL NUMBER (5) 02-196	
Street Capitol Mall		City Sacramento	

ITEM NUMBER (Triple space between items) (6)	CUBIC FEET* (7)	CALIFORNIA STATE ARCHIVES USE ONLY (8)	TITLE AND DESCRIPTION OF RECORDS (Triple space between items) (9)	MEDIA (10)	VITAL (11)	RETENTION (12) (13) (14) (15)				PRA (Exempt) & IPA (16)	REMARKS (17)
22 23	0 0	NOTIFY ARCHIVES	ADMINISTRATIVE RECORDS Speaking Comments - Director - Chief Deputy Director	P P		A+1 A+3			A+1 A+3		Purge 1 year after date of completion. Purge 3 years after date of completion.
24	2		Governor's Action Requested	P		A+8			A+8		
25	3		Secretary's Action Requested	P		A+8			A+8		
26	0		Communications Action Requested	P		A+8			A+8		
27	1.5		Request for Report Approval	P		A+8			A+8		
28	1		DE 9112, Reques to Schedule a Conference or Meeting	P		A+4			A+4		
Informational only copies. Originals kept at Branch or BOPSD.											

Provide total of office and departmental storage only.

Retention Schedule #101 has replaced schedule #60. Here are the changes.

<u>OLD LIST#</u>	<u>now</u>	<u>NEW LIST#</u>	<u>COMMENTS</u>
1		1	
2		13	
3		2	
4		3	
5		18	
6		1711	
7		15	
8		12	
9		4	
10		5	
11		6	
12		22& 23	
13		Deleted, no longer used.	
14		16	
15 through 33 have been deleted. It appears they listed all groups within the department and we see no reason to do this. This function no longer exists.			

02-196

Key.....1088
Approval no.....1995-008
Date received.....1995/02/07
Department.....Director -- Part of: Employment Development Dept.
Dep/Office/Org... DEP 5100 Employment Development Dept.
Schedule date....1995/01/19
Schedule no.....60
Series.....Director's Calendar which could include: Director's
Calendar, Director's Speaking Events
Director's Office Correspondence Log, which could
include: Referral from Governor's Office
Administrative Records; Speaking Comments: Thomas P.
Nagle, Director
Administrative Records; Speaking Comments: Al Lee,
Chief Deputy Director
SchStatus.....1
Revision.....0
Cubic feet.....20
Reviewer.....Joe Samora
Not in use.....1967/12/31
Date signed.....1995/02/07
Record Type.....RS

Key.....5734
Schedule.....60; 1995-008; Employment Development Dept.
Series Title.....Director's Calendar which could include: Director's
Calendar, Director's Speaking Events
ArcFlag.....Flagged for Archives
Series Number...9
Office ret.....4
Dep ret.....0
SRC ret.....0
Total ret.....4
Access Restr.....0
Media.....2294
Appr no temp....1995-008
Record Type....SE

Key.....5735
Schedule.....60; 1995-008; Employment Development Dept.
Series Title.....Director's Office Correspondence Log, which could
include: Referral from Governor's Office
ArcFlag.....Flagged for Archives
Series Number...10
Office ret.....4
Dep ret.....0
SRC ret.....0
Total ret.....4
Access Restr.....0
Media.....2295
Appr no temp....1995-008
Record Type....SE

Key.....5736
Schedule.....60: 1995-008: Employment Development Dept.
Series Title.....Administrative Records; Speaking Comments: Thomas P.
Nagle, Director
ArcFlag.....Flagged for Archives
Series Number....12a
Office ret.....1
Dep ret.....0
SRC ret.....0
Total ret.....1
Access Restr....0
Media.....2296
Appr no temp....1995-008
Record Type.....SE

Key.....5737
Schedule.....60: 1995-008: Employment Development Dept.
Series Title.....Administrative Records; Speaking Comments: Al Lee,
Chief Deputy Director
ArcFlag.....Flagged for Archives
Series Number....12b
Office ret.....3
Dep ret.....0
SRC ret.....0
Total ret.....3
Access Restr....0
Media.....2297
Appr no temp....1995-008
Record Type.....SE
